



BUDGET AND FINANCE ANALYST / SENIOR BUDGET AND FINANCE ANALYST

Purpose:

To actively support and uphold the City's stated mission and values. To perform a variety of professional level administrative and analytical work involving the preparation, study and application of City budgets and finances; and to perform duties involved in the research, analysis and development of efficient systems.

Distinguishing Characteristic:

Budget and Finance Analyst

This is the entry level class in the Budget and Finance Analyst series. This class is distinguished from the Senior Budget and Finance Analyst by the performance of the more routine administrative and analytical duties assigned to positions within the series including assisting in the city budget preparation and administration; conducting fiscal impact analyses; revenue and expenditure forecasting; and conducting administrative and systems studies. Since this class is typically used as a training class, employees may have only limited directly related work experience.

Senior Budget and Finance Analyst

This is the journey level class within the Budget and Finance Analyst series. Employees within this class are distinguished from the Budget and Finance Analyst by the performance of the full range of duties as assigned including conducting in-depth administrative and systems studies; financial analysis; developing and performing independent statistical and research studies; preparing comprehensive multiyear financial econometric models and plans along with economic impact studies; and developing and assisting in the implementation of goals and objectives for the Budget and Finance Division. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise, and are fully aware of the operating procedures and policies of the work unit. Positions in this class are flexibly staffed and are normally filled by advancement from the lower class of Budget and Finance Analyst, or, when filled from the outside, require prior budget and finance experience, preferably in a public agency. Appointment to the higher class requires that the employee be performing the full range of duties assigned to the class.

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Budget and Finance Analyst / Senior Budget and Finance Analyst (continued)

Supervision Received and Exercised:

Budget and Finance Analyst

Receives general supervision from the Deputy Financial Services Manager, and functional supervision from the Lead Budget and Finance Analyst.

Senior Budget and Finance Analyst

Receives general supervision from the Deputy Financial Services Manager, and functional supervision from the Lead Budget and Finance Analyst. May exercise functional and technical supervision over less experienced staff.

Examples of Duties:

This class specification is intended to indicate the basic nature of positions allocated to the class and examples of typical duties that may be assigned. It does not imply that all positions within the class perform all of the duties listed, nor does it necessarily list all possible duties that may be assigned.

Duties may include, but are not limited to, the following:

- Participate in annual operating, capital and city budget preparation and administration; conduct fiscal / economic impact studies and cost / benefit analyses; coordinate the preparation of manuals and comprehensive and timely budget documents.
- Perform comprehensive multiyear econometric models and scenarios; financial projections and plans involving revenue and expenditure forecast analysis.
- Research economic trends at national, regional, state and local levels.
- Assist in developing city financial policies.
- Conduct city-wide base budget hearings; monitor city-wide departmental patterns; prepare and distribute budget reviews.
- Advise management, departments, and divisions on budget problems, policies, and procedures and assist them in the maintenance of proper budgetary controls.
- Assist with the preparation and administration of the city's capital improvement program, debt management plan, and annual financial reports; assist

Effective November 1988

Reviewed October 1993

Revised December 2000

Revised February 2001

Revised Feb 2006 (job title, duties, and MQ)

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department and division heads in developing and improving operational objectives.

- Conduct administrative and systems studies; evaluate, and prepare reports and recommendations for improving policies, procedures, methods, and systems of operation.
- Conduct performance measurement / benchmarking and productivity studies; review performance and program direction; evaluate and recommend changes to improve productivity.
- Design and conduct surveys; economic impact studies; utility rate reviews; and prepare proposals on financial and staffing requirements; design, develop and perform various independent statistical and research studies to monitor economic processes affecting the budget.
- Present financial analysis to council committees; present policy analysis or other financial feasibility studies to senior management, council committees, and policy makers.
- Establish short and long range planning goals and objectives for, and coordinate special projects assigned to the Budget and Finance section.
- Perform the costing of Police and Fire MOU agreements; generate the Quarterly Revenue Report; and provide financial analysis on upcoming legislative issues that may impact city revenues.
- Perform related duties as assigned.

Experience and Training Guidelines:

Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. The hiring department may include job related experience, training or license and certification preferences at the time of recruitment. A typical way to obtain the knowledge and abilities would be:

Experience:

Budget and Finance Analyst

Two years of full-time, professional experience in budget, finance, economics, management analysis, or accounting work preferably some of which is in government.

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Senior Budget and Finance Analyst

Three years of full-time, professional experience in budget, finance, economics, management analysis, or accounting work which should include at least two years of increasingly responsible budget and finance experience in government.

Training:

Budget and Finance Analyst

Equivalent to a Bachelor's degree from an accredited college or university with major course work in business administration, finance, statistics and research, accounting or a related field. A Master's degree is highly desirable.

Senior Budget and Finance Analyst

Equivalent to a Bachelor's degree from an accredited college or university with major course work in business administration, finance, statistics and research, accounting, or a related field. A Master's degree is highly desirable.

This position is included in the City's classified service, pursuant to City of Tempe Personnel Rules and Regulations, Rule 1, Section 103.

Job Code: 1919 / 1920

FLSA: Exempt / Exempt